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ABSTRACT

Effective meeting leaders--people who know how to manage meetings, not just hold them--understand the two main arenas of any meeting: content issues and process activities. These two arenas are interdependent upon each other. This book is designed to help educators lead more effective meetings through increased process awareness. Chapter 1 offers suggestions for preparing for the meeting, which include defining its purpose, determining if the meeting is necessary, and selecting participants. The second chapter provides guidelines for developing the meeting agenda. Components to be considered are time, location, desired outcomes, persons responsible, and materials. Tips for facilitating the meeting are presented in chapter 3, such as opening the meeting, establishing ground rules, encouraging participation, and dealing with disruptive behavior. The concluding chapter discusses the importance of reviewing the action plan that was developed during the meeting. Nine figures are included. The appendix contains a meeting planning reference guide. (LMI)

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How to Get the Most Out of Meetings

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How to Get the Most Out of Meetings

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Introduction

MANY EDUCATORS ARE REALIZING THE SYNERGISTIC VALUE OF working in teams: school improvement teams, curriculum committees, parent-teacher organizations, etc. If you've served on a few teams or committees, you've probably experienced the frustrations of meetings, especially the problems of poor meeting management. Too often, meeting leaders focus on the content of the meeting and ignore the process of conducting the meeting. The meeting gets off-track and the objectives of the meeting are never reached.

Effective meeting leaders—people who know how to *manage* meetings, not just hold them—understand the two main arenas of any meeting: *content issues* and *process activities*. These two arenas are dependent upon each other. If the process is ignored, the content will suffer. If the process is carefully tended, the content will flow more easily. Likewise, the content must be carefully considered when selecting process activities.

Process activities deal with the meeting format and the ways in which the group is working. Process activities include deciding if a meeting is even necessary and then preparing for it by building an agenda and selecting facilitation tools that will lead to results. Remaining flexible and observing both verbal and nonverbal communication during the meeting are also part of a process focus.

This book is designed to help you lead more effective meetings through increased process awareness. In this book you will learn how to:

- determine if a group meeting is necessary
- develop a clear, well-defined agenda
- determine what and who you need to make the meeting successful
- open the meeting effectively

- encourage useful participation during the meeting
- handle disruptive behavior during the meeting
- conclude the meeting effectively
- ensure action items are followed through

1. Preparing for the Meeting

Defining Your Purpose

Many team sessions fall apart because of the leader's poor organizational skills and poor planning. The time you spend up front, before the meeting, will pay off many times over. The very first step in planning a meeting is to determine its *purpose*. The purpose of the meeting is stated as a verb and often begins with "to" (see Figure 1.1 on page 4). The purpose answers the question, "What are the reasons for the meeting?"

Your next step is to determine the desired outcome of the meeting. *What are your goals? What do you expect to get out of the meeting?* The desired outcome is stated as a noun. You want your desired outcome to be clear and concrete; this is your destination, your "end-product" of the meeting.

As Figure 1.2 on page 5 illustrates, the meeting purpose and desired outcome are the foundations of the meeting. When the foundation is weak, the other meeting planning steps are also weak. Figure 1.2 illustrates the sequence of meeting planning. The very first step is to determine the purpose and desired outcome. All other decisions (who should attend the meeting, where to hold it, what should be on the meeting agenda, etc.) depend on the purpose and desired outcome of the meeting.

Most meetings have more than one purpose and more than one desired outcome. When writing your purpose and desired outcome statements, keep them short; phrases are preferable. It's better to have several short purpose statements rather than one long one. Strive for clarity. In

reducing your purpose and desired outcome statements, you will simultaneously refine your thoughts and achieve clarity.

Beware of being too lofty. For instance, the purpose of a meeting might initially be "to increase computer lab time." But can you really increase computer lab time during this meeting? A more realistic purpose might be "to generate ideas on how to increase computer lab time," with a desired outcome of "a prioritized list of suggestions on how to increase computer lab time."

After you've developed your purpose and desired outcome statements, show them to someone else—preferably someone who will be at the meeting. Ask her to do a "reality check." Can this desired outcome really be accomplished in the time you have allotted? Does she understand the purpose and desired outcome to mean the same thing as you do? If she were to receive the purpose and desired outcome statements in her meeting announcement, would she know exactly why she was asked to attend? Would she know what she was expected to get out of the meeting? Once you have feedback on the reality and the clarity of the purpose and desired outcome, adjust them to make them more realistic and clear to all meeting participants.

Figure 1.1

Examples of Purposes and Desired Outcomes of Meetings

PURPOSE	DESIRED OUTCOME
To develop an action plan	An action plan
To generate a list of ideas	A list of ideas
To decide	A decision
To clarify	An understanding of
To solve a problem	A solution
To coordinate activities	An action plan
To list the pros and cons	A list of pros and cons
To review the data	An understanding of the data
To identify roadblocks	A list of roadblocks

Figure 1.2
The Steps of Meeting Planning

Determining if the Meeting is Necessary

It is important to determine the purpose and desired outcome of your meeting *before* deciding that a meeting is necessary. Think of all the meetings you've attended, either at school or in the community, that should not have been held. Many leaders hold meetings as "knee-jerk" reactions or out of habit, without considering alternatives. Quite often, the purpose and desired outcomes can be achieved through other means, such as:

- a phone call
- a conference call
- a video conference
- speaking with the people individually and getting ideas

- written communication
- written communication that is routed to individuals. Each individual writes his thoughts and comments on the issue and passes the information to the next person on the routing list.

When deciding if a meeting is necessary, consider the effectiveness of these alternatives and the costs involved. A meeting is a superior method to the above alternatives when:

- a complex subject needs to be addressed
- people are interdependent
- ideas are interdependent
- no one person has all the information
- group commitment is necessary

Selecting Meeting Participants

How many meetings are you invited to? How many of these meetings really require your attendance? Do you find yourself thinking, "Why am I here?"

When planning a meeting you need to ask who really needs to be there. Are you inviting them out of habit or out of courtesy? If it's courtesy, let them know that their attendance is welcome but not mandatory by using a "cc:" or an "FYI" notation.

We tend to invite the same people to the same meetings out of habit. Start challenging your meeting habits by more carefully selecting participants for meetings. When deciding who should attend, consider people who:

- *can help implement the decision.* Wouldn't it be nice to have them involved from the start to develop commitment and gain support for the decision?
- *can block the decision or action.* By addressing their concerns and getting them involved in the start, you have a good chance of turning "blockers" into "implementers."
- *actually do the work.* Those closest to the problem or opportunity may have the best and most realistic ideas.
- *are customers.* Both internal and external customers need to be included for their ideas and feedback. Are you including external customers such as parents, students, and

community members? Are you including internal customers such as teachers, administrative aides, teaching assistants, central office staff, and administrators? It may not be appropriate to include these people at all meetings, but do continually ask yourself if they should be there.

• *have authority and resources.* Have you ever met with a group who made a decision and only later checked with Ms. Big Bucks to see if you could get the money to put your ideas to work? What's the result? A feeling of "Why did we spend all that time discussing this idea when we don't know if we have the money to do it?" Usually, another meeting is necessary to follow up after someone has checked with Ms. Big Bucks. It's ideal to have Ms. Big Bucks there at the beginning. If that's not possible, you should at least know the parameters of your financial, technical, and human resources.

• *are affected by the decision, problem, or opportunity.* They may have the best insights into the solution. Their participation is also critical for developing commitment.

Once you've identified the participants of the meeting, start crossing names off. Do they really need to be present? Can you share the information with them in some other way? How is their presence going to contribute to the purpose and desired outcome?

The old saying "the more the merrier" does not hold true for meeting participants. There is no ideal number of participants to have at a meeting. Old management theory used to advise having six or seven participants at each meeting. The contingency theory of management says "it depends." On what does it depend? The purpose and desired outcome!

2.
Developing the Agenda

THE AGENDA COMMUNICATES TO PARTICIPANTS THE PURPOSE AND desired outcome of the meeting, the meeting topics, and other important information. It is viewed as the road map of the meeting.

Sending an agenda to participants before the meeting, preferably a week ahead, can make the meeting more efficient and productive. Like the leader, participants need to be prepared; they need to know what to expect and what role they will be playing during the meeting. A week's notice gives participants time to let you know if the purpose and desired outcome are not clear and to offer suggestions for changing the agenda.

The agenda should include:

- the meeting time
- date of the meeting
- location of the meeting
- who called the meeting
- the purpose and desired outcomes
- the agenda items
- the desired outcomes for each agenda item
- persons responsible for each item
- the time allotted for each item
- required materials and necessary preparation

Figure 2.1 on page 11 shows a sample agenda form; Figure 2.2 on page 12 is an example of a completed agenda.

The Meeting Time. Include both the starting and ending time. Meetings that have no specified ending time often last longer than necessary and cause people to leave early because of other commitments. Let people know the ending times *before* the meeting begins, so they can schedule their other commitments accordingly.

Consider the overall meeting length. People can stay on target for no more than an hour and a half. Is your meeting going to last more than two hours? How will you schedule breaks? Are you meeting after lunch or after school when most people have a lower level of energy?

What about your participants? A "good" meeting time for someone working in an administrative office may not be a "good" meeting time for a classroom teacher.

Date. Include both the day of the week and the calendar date. If you're changing the day of a standard meeting (for example, a weekly faculty meeting), let people know in advance and highlight the change on the agenda.

Location. Again, you need to consider your meeting purpose and participants when deciding where to meet. Will the group be engaged in creative, divergent thinking? If so, an off-site location is best. Are you stuck in the same old meeting habits? Are the same people contributing while others are silent? Try switching meeting rooms within the building and altering the seating arrangement. These simple physical changes can break some participation habits and alter behavior at meetings.

Is your location accessible to all participants? Are you asking any guests to the meeting who might require special accommodations? Will they have trouble finding the building or the meeting room? If so, include a simple map when you send out the agenda. Is the room equipped to meet any audio-visual needs? It is never safe to assume that a room is equipped with what you need. Is travel to the meeting location a consideration? What are the costs associated with that travel? Will you be interrupted at this location? Do you need access to a phone?

Who Called the Meeting. Include your name and phone number so people can contact you if they have questions on the meeting purpose or input on the agenda items.

The Purpose and Desired Outcome. This information is vital to the agenda, since the agenda is dependent on it. The purpose and desired outcome give participants "the big picture." The purpose tells them "why we are having this meeting." The desired outcome tells them "what we will get out of the meeting." Remember, too, that your agenda is your road map; should your meeting wander off track, checking the purpose and desired outcome will help the group get back on course.

The Agenda Items. Be specific when listing agenda items. For example, "gifted student resource room" could be interpreted as a new location for the resource room, a new scheduling procedure, maintenance problems in the room, behavior problems experienced with the students, or an update from the teacher on curriculum. If participants are expected to come to the meeting prepared to discuss the topics on the agenda, they need to know exactly what they are! Accurately describing agenda topics also helps you as a leader manage expectations (and possibly rumors).

In deciding the sequence of items on the agenda, go with what makes sense. If you're planning the school carnival, it would be practical to review last year's carnival and the current budget before determining activities, food items, etc. If the meeting has no logical flow—if it's covering a "potpourri" of topics—start with a couple of relatively easy topics, then move to heavier items, and save another easy topic for last. This kind of sequence fosters teamwork by having the group reach easy agreements early in the meeting. Experiencing "quick wins" right away and feeling good about them will help the group when they begin discussing the tougher topics. Saving a lighter issue for the end of the meeting also reinforces teamwork and increases the chance of everyone leaving on a good note.

Desired Outcome for Each Agenda Item. By including a desired outcome, you answer the question, "what is our goal in talking about this item?" For example, if the item to be discussed is the new late-to-class policy, the desired outcome—"understanding how to implement the policy"—will send a distinct message to the participants: The policy is being discussed to make sure they understand it, not to decide whether there should be a policy (others have already done that) or to debate its effectiveness (which could take hours). The policy is on the agenda so the participants will understand *how to implement the policy, period!* This specificity will enable you to bring focus to the meeting.

Person Responsible. The sample agenda in Figure 2.1 includes a "person responsible" column for each item. This allows you to share the facilitation of the meeting and thereby increase participants' sense of ownership. Quite often, when participants know more than the leader about a

Figure 2.1
Agenda Format

Date: Location:
Starting time: Ending time:
Meeting called by:
Participants:

Purpose:

Desired outcome:

Agenda Item	Desired Outcome	Person Responsible	Time Allotted

Necessary preparation:

Figure 2.2

Meeting Agenda

Date: 4/18/94

Starting Time: 3:30 p.m. Ending Time: 4:45 p.m.

Meeting Called By: Mike Albott Location: Room 4, Northcrest Elementary School

Participants: School Improvement Team Members (Scott Seth, Marilyn Jones, Juanita Brown, Bill Starr, José Alverez, LeRoy Bierlein, Anita LaManot)

Purpose: to discuss the positive discipline plan for 1994–1995 school year

Desired Outcomes: (1) familiarity with other schools' positive discipline plans
(2) a prioritized list of components of Northcrest's Plan

Agenda Item	Desired Outcome	Who	Time
1. Review purpose, desired outcome, agenda, ground rules	Agreement on purpose, desired outcome, agenda, ground rules	Mike A.	10 min.
2. Discuss attached discipline plans	Familiarity with plans from Woodlot, Central, & Meadow Schools	Bill S.	15 min.
3. Brainstorm components for Northcrest's plan	A list of components for Northcrest's plan	Juanita B.	20 min.
4. Prioritize components	Agreement on prioritized list	Juanita B.	20 min.
5. Wrap-Up	Clarification of action register, issue bin Feedback on today's meeting Topics, date, and time for next meeting	Mike A.	10 min.

Note: Please read attached positive discipline plans from Woodlot, Central and Meadow schools prior to this meeting.

topic, it's a good idea to share some of the meeting leadership with them. If you do, however, you need to be respectful of different personalities. Some people can lead a group discussion with very little notice, while others require time to prepare. If you're going to count on participants to lead portions of the meeting, let them know ahead of time, before you send out the agenda.

Time Allotted for Each Item. Figure 2.1 also includes space for noting how much time is allotted for each agenda item, which is important for both planning and facilitating the meeting. In the planning stages, you can see if the beginning and ending times of the meeting are realistic by adding up the time allotted to topics on the agenda. During the meeting, you can prevent time overruns by specifying up-front how much time is allotted to each item. Of course, you can always renegotiate the agenda if you run over time during a productive discussion; the key is to make a conscious choice to alter the agenda so that you don't simply run out of time. Although there is no exact science in estimating how long an agenda item will take, you can ask yourself:

- How much information do the participants have on this topic? You may have to dedicate some time to bringing people "up-to-speed."
- Is this a hot topic involving strong emotions? If so, allow more time for a lengthy discussion.
- Will participants need to share information on this topic? If so, you'll need more time for discussing and understanding the new information.

Required Materials and Necessary Preparation. Do participants need to bring any materials with them? Must they do some reading prior to the session? Will they need to bring a list of questions on a new policy? Do they need to bring an open mind for discussing new ideas? Write down (and possibly highlight) any preparation you expect participants to do before the meeting begins.

If you're thinking that this is becoming very time consuming, you're right. Meetings are time consuming. A general rule of thumb is that the meeting leader spends about one hour of planning time for every one hour of meeting time. Of course, some meetings will require a good deal more time and others much less. The key is that the

time you spend up front planning the meeting reduces the actual meeting time. It makes a lot of sense for you to spend an additional planning hour to reduce one hour of a meeting involving ten peoples' time!

3. Facilitating the Meeting

Opening the Meeting

THE ROOT WORD OF FACILITATE IS *FACIL*, WHICH MEANS TO MAKE things easy. As a meeting leader, your role is to make participation in the meeting easy and to make reaching the desired outcomes achievable. The work you have done up front in preparing for the meeting will greatly aid in your facilitation of the meeting.

Establishing Expectations

At the beginning of the meeting, after you have welcomed the participants, review the reason for holding the meeting and make sure everyone is in agreement about the desired outcome. People will be coming to your meeting thinking of their school day, their most recent phone call, and so forth. Some may not have read the agenda you sent them, and some will have forgotten to bring it along with them to the meeting. Thus, reviewing the purpose and desired outcome will provide focus and direction and ensure that everyone agrees on why they are there and what they expect to get out of the meeting. This agreement also serves to prevent hidden agendas and wandering off topic later on.

Next, review the agenda and make sure participants agree on it, as well. This is an opportunity for them to offer additions or deletions that you may have overlooked. Again, this agreement on the agenda (or modified agenda) will help curtail off-topic discussions.

The Recorder and Timekeeper

As mentioned earlier, participants must know in advance what kind of participation is expected of them. The beginning of the meeting is the ideal time to clarify roles and expectations. Are you going to be using a recorder to capture key discussion points? Instead of creating traditional meeting minutes, many groups are now using a "group memory" process to record the meeting. During discussion, the recorder writes down key words and phrases on a large flipchart in front of the room. Separate pages may be used to list key decisions or agreements. The filled-up paper is posted in the room to serve as a reference to what has been discussed. Since the group memory is visual to everyone during the meeting, it provides clarity on what has been said. The memory also helps the group remain focused on the task at hand. By not including names with recorded comments, the memory helps to depersonalize ideas, thereby allowing participants to focus on *what* was said rather than on *who* said it. After the meeting, the memory, or key parts of the memory, is transcribed and distributed to meeting participants and other key individuals.

The role of the recorder must be determined at the beginning of the meeting, if not before. It's important to remember that while the recorder is writing on flipcharts, he won't be free to participate as completely as everyone else. Many work groups who meet regularly rotate the role of the recorder, using a set rotation. Some teams even change recorders in mid-meeting. For example, Clyde may serve as recorder for the first two agenda items because he doesn't have much input on them. When the group reaches the third agenda item, Juanita may step in as recorder, freeing Clyde to be a fully active participant.

Another role to be determined at the beginning of the meeting is that of timekeeper. We've all attended meetings that never got through the entire agenda. The timekeeper can make the group aware of when the time for each agenda item has expired. It is then up to the leader to negotiate more time on the agenda or move to the next item. Some timekeepers can be quite militant and literally cut off discussion when the time has expired. While this approach

may be effective for back-to-back presentations at a conference, it's not generally recommended for meetings.

The roles of the timekeeper and the recorder can be included in the meeting ground rules, which openly state expectations of appropriate behavior and roles at the meeting.

Ground Rules

It is best to define ground rules at the beginning of the meeting. A group that meets often may have standing ground rules with additions or deletions made for individual meetings as necessary. Ground rules not only set expectations for positive behavior, they also help limit negative behavior. Figure 3.1 lists some common ground rule topics.

Figure 3.1

Common Ground Rule Topics and Examples

Topic	Example
Type of participation desired	• Active participation by all • All ideas are good ideas
Nonnegotiable items	• Budget of $3,500 • Meeting must end by 4:45
Role assignments	• Recorder • Timekeeper
Confidentiality issues	• Confidentiality is expected • All conversations stay in this room
Decision-making procedure	• Consensus • Majority rules • Gathering input today; decision made later
Behavior boundaries	• One person speaks at a time • Minimize side conversations • No interruptions
Basic housekeeping issues	• Smoking in corridor only • Short break every hour

You can increase commitment to the ground rules by having the group define them rather than doing it yourself. If you do have a few ground rules already specified, be sure to solicit the group's input for additional items. Try to state ground rules in positive terms (for instance, "Smoking is allowed in the corridor only" rather than "No smoking").

Once participants have agreed on a list of ground rules, make sure they're willing to live with them. Explain that the ground rules are a working document; the team can add to them or remove them as needed during the meeting.

Encouraging Participation

The leader's primary role is to monitor the process of the meeting. This focus on process is critical to getting the type of participation you desire. You must observe group members for both verbal and nonverbal communication. When you focus on the process, you must continuously ask yourself:

- Who is not contributing? Do they have important information that should be shared?
- Is someone dominating the group?
- Is the participation turning from constructive to destructive?
- Is the group keeping on track?
- Are we observing the time limits? If not, should we renegotiate the agenda?
- Are participants building upon each other's ideas?
- What is the level of energy and enthusiasm?
- Are some people tuning out? Why?
- Is the group showing signs of closure?

Forms of Participation

Meeting participation can take many forms; the most appropriate participation for a particular topic depends on the topic itself. If you're introducing new districtwide policies, you may want participants to hold their questions until the end. If you're trying to define a problem, you may need to tap the creative resources of the participants and get them actively involved in brainstorming. Are you trying to gain support for a proposal? Solicit feedback? Gain group

cooperation? Announce a nonnegotiable change? Depending on the topic, you'll need to plan differently for the group's participation.

A proactive approach to encouraging useful participation is to actually state the type of participation desired at the beginning of the meeting. This can be incorporated into the ground rules. Or it can also be effectively handled at the beginning of each agenda item.

Group Dynamics

Consider group dynamics, too. Looking at the content, desired outcome, and team members, would a large-group discussion be appropriate, or would breaking into small groups work better? Often, smaller groups of three or four individuals foster more creativity and openness. The small groups' ideas are then shared with the larger group. There is no individual ownership of specific ideas, which can be a big plus for members who are hesitant to offer their ideas in front of the large group. Here are some additional techniques for encouraging participation:

- Write ideas on a flipchart or board. Seeing an idea in writing helps validate the idea and encourages the group to build on each other's thoughts.
- Actively listen. Show that you've heard what another person has said.
- Ask open-ended questions (what, when, why and how).
- Use silence. Count to ten after asking a question.
- Poll the group. Go around the room in a systematic fashion. This is useful for ensuring that even quieter individuals get a chance to speak.
- Direct your questions to a specific individual.
- Give nonverbal reinforcement.
- Maintain eye contact.
- Defer to the group. Don't answer all the questions yourself. Bounce them back to the team.

If you're leading a highly participative group or individual and you feel the need to move on to the next topic, try using the following techniques:

- Ask questions that require a simple "yes" or "no" response.
- Ask for a link to the next item. For example: "We have

heard Sam's concerns on the use of the teaching assistants. How do these concerns affect us as we look at the proposed math curriculum, which is next on our agenda?"

- Thank the participant and move on.
- Summarize and move on.

An issue bin (also called a hopper) is an effective tool for encouraging ideas while maintaining focus within a meeting. A blank piece of paper entitled "issue bin" is posted on the wall at the beginning of the meeting. When an idea is mentioned that is not pertinent to the current discussion, it is put in the issue bin to be captured. It is not forgotten, but deferred; it may be dealt with later in the meeting, at a future meeting, or put on an individual's "to do" list. In the meantime, the meeting stays on track.

The use of the issue bin encourages participation because participants feel free to offer ideas and suggestions when they occur. They're not told, "We can't talk about that now" or "Save that thought for later," only to find when "later" arrives that thought is lost or forgotten. Instead, those thoughts are visually preserved in the issue bin.

To be effective, the issue bin must be reviewed at the end of the meeting to determine how and when each item in the bin will be addressed. The effectiveness of the bin will be lost if any of the items in it are ignored.

Creative yet valid alternatives are often overlooked in a rush to reach a decision. Most work teams include a variety of individuals with different cultural and educational backgrounds, different work experiences, and different knowledge and opinions. These differences in individuals often lead to differences in viewpoints that, unfortunately, are seldom encouraged during meetings.

By actively soliciting diverse viewpoints, a meeting leader can help the team arrive at higher quality decisions and gain greater acceptance and commitment to them. To encourage differing views, you can tell the group you need to consider many different views in order to make good decisions. First, you'll need to create a safe environment in which views may be expressed. Specific ground rules, such as "All ideas are good ideas," can be added. You and other team members will need to consciously separate ideas from individuals and carefully monitor your body language.

There are many creative techniques for generating ideas. Which technique works best? It depends; there is no one best way or one system that works every time. The dynamics of the group, the task at hand, the knowledge level of the group, the importance of group acceptance, and the decision-making procedure are all variables that need to be considered. One very popular technique for idea-generation is brainstorming. Brainstorming is useful when you need to come up with a variety of creative, free-wheeling ideas in a short period of time. To be effective, certain guidelines, listed in Figure 3.2, must be followed. If they are not followed, the effectiveness of brainstorming is diluted.

Figure 3.2

Brainstorming Guidelines

1. The group leader reviews the brainstorming process and solicits agreement on the following ground rules:
   - Ask questions only for clarification.
   - Try to piggyback off others' ideas.
   - Look past the obvious.
   - It's okay to pass.
   - No evaluation of ideas.
2. The group leader presents the problem as a question and writes it at the top of the flipchart board.
3. Participants write down their ideas; no discussion. (This step is optional. If some participants are hesitant to share their ideas, having the ideas in writing will give them courage.)
4. Ideas are written on the flipchart (or board). They can be generated through a polling or popcorn approach.

   POLLING (to make sure each person's ideas are heard)—Go around the room twice to gather each individual's ideas one at a time. After two rounds, the process is opened so that anybody can offer additional ideas.

   POPCORN (to help participants build on each other's ideas)—Participants offer ideas when the ideas are hot. There is no systematic polling of the room; anyone can offer an idea at any point.
5. After all the ideas have been written on the flipchart or board, review them with the team. Clarify any questions on the meanings of the ideas. Combine obvious duplicates. The author of an idea has veto power over whether or not it should be combined.

Dealing with Disruptive Behavior

Disruptive behavior can hinder or block the team's progress toward meeting objectives. Disruptions are usually unintentional, but they must be dealt with.

Disruptive behavior includes side conversations, arriving late, leaving early, dominating the conversation, wandering off the agenda, negativism, putting down other participants' ideas, and interrupting. All of us exhibit disruptive behavior at meetings at one time or another. When is it truly disruptive? When it distracts the team from reaching the desired outcomes of the meeting!

The way in which a leader handles disruptive behavior and the timeliness of the corrective action are critical to the process of the meeting. Deciding when to act is a judgment call. As the meeting leader, you need to determine how this behavior is affecting the group and the group's progress toward the desired outcomes. If the disruptive behavior is having a negative impact, you'll need to take action. Here are some guidelines for minimizing disruptive behavior:

Reinforce acceptable behavior. This sounds so simple, yet it is often not done. Think of all the meetings you've attended when you've had to wait for late-comers to arrive. Was the leader reinforcing your positive behavior of arriving on time? No. You were being punished for arriving on time by having to sit and wait. How about the late participant? His unacceptable behavior was being reinforced by everyone waiting for him to arrive before the meeting began.

Protect participants' self-esteem. Remember to focus on problems or behaviors, not people. Most of us unintentionally disrupt meetings; we're completely unaware of how our behavior may be affecting others. A helpful hint in dealing with disruptive behavior is to remind yourself that you want to get rid of the behavior, not the person.

Stay calm. Seeing a team leader lose control is not a pretty sight! If the leader can't stay calm, he risks attacking the person instead of the behavior and losing control of the entire meeting. If you find yourself becoming that annoyed with someone, call for a break so you can regain your composure and deal effectively with the situation.

Avoid overreacting. Use a lower level of intervention

(nonverbal signals, walking toward the person) before you use a higher-level action (direct statement to the person or a private discussion).

Use your sense of humor. Use humor with care. Well-timed humor can help alleviate tension; just make sure it doesn't have a knife hidden in it!

Use nonverbal behavior. Communications research tells us that 55 percent of our message is sent through body language and facial expressions. Don't ignore this powerful method of dealing with problem behaviors at meetings. Simple actions such as walking toward a participant or turning your back to a dominating person can be very effective. Nonverbal actions on your part can take care of many disruptive behaviors.

Use the ground rules. The ground rules are most effective when they are posted in the room as a visual reminder of how the team has agreed to work together. If they are not being followed, check with the group: "I need to check some of our earlier agreements. We agreed to . . . . Is this still valid, or do we need to modify the ground rules?" It's possible that the ground rules were unrealistic and need to be changed. If so, go ahead and modify them!

Let the group help. Team members will often monitor their own behavior and give each other gentle reminders of what they agreed to in the ground rules. By setting the ground rules as a team (instead of your "presenting" them to the team), you can increase commitment to them and enable the team to become more self-monitoring.

Refer to the agenda. Like the ground rules, having the agenda posted in the room can be a tremendous help when the group needs to refocus. If the agenda is reviewed and agreed upon at the beginning of the meeting, you will find the group referring back to it. Just by walking over to the agenda, you can send a message of the need to refocus. Having one agenda posted in the room that the whole team is working from also sends the subtle message of teamwork, a sense of everyone being in this together.

Make a direct statement. If several side conversations are going on in the room, a simple statement, such as "I'm having trouble hearing John's idea," can help stop them. A higher level of intervention would be to say to the person carrying on the side conversation, "Mary, could you hold

that thought for a moment? I'd like to hear what John has to say. Then we'll hear your thoughts." This same approach can be used for other disruptive behaviors such as interruptions, negativism, etc.

Refocus. Refocusing back to the topic at hand or the desired outcomes of the meeting can help a team get back on track after disruptions have occurred. Refocusing is also helpful after a long-winded team member has given his opinion on the topic. Many of the team members may have stopped listening midway through his monologue. By quickly acknowledging his thoughts and refocusing on the topic at hand, you can bring the other team members back into the conversation.

Speak privately with the individual. The key word here is *privately*. When you speak privately with the disruptive individual, remember to focus on the behavior, not on the individual. Indicate why this behavior is a problem. How is it blocking the team from reaching its desired outcomes? You may want to get input from the individual. Remember, disruptive behavior is usually unintentional.

What you as the meeting leader do prior to and at the beginning of the meeting can do much to prevent disruptive behavior during the meeting. By getting clear agreement on the purpose, desired outcomes, agenda, and ground rules, you will increase commitment and ownership to the team efforts. This method of going slowly up front and getting these clear agreements allows you to progress more rapidly through the meeting.

4.
Concluding the Meeting

YOU MAY BE A HIGHLY ORGANIZED MEETING FACILITATOR, BUT IF nothing happens as a result of the meeting, then the meeting was a waste of time. The most important step you can take to ensure that action is carried out is to develop an action plan during the meeting.

An action plan should answer these questions:

- What is the task (or action step) to be completed?
- Who is going to do it?
- By when will it be done?

The action plan (also called an action register; see Figure 4.1 on page 26) needs to be developed during the meeting. Keep it visible to remind participants what has been agreed upon to do, who has volunteered to do what, and the schedule for completing these steps.

At the end of the meeting, review the action register. Clarify who is going to do what, and make sure everyone understands exactly what they are to do and by when it should be done. During this review, several action items may be eliminated from the list. What may have been important early in the meeting may now take a back seat to other priorities developed later in the meeting.

Also review the issue bin at the conclusion of the meeting. It needs to be cleared: each item must be discussed, delegated, put on the next meeting's agenda, or agreed to be dismissed. If the issue bin is not revisited at the end of the meeting, it will soon become viewed as a garbage can and lose its effectiveness.

Decide which parts of the group memory will be distributed to meeting participants. Challenge your habits of distributing meeting notes. Is it really necessary for

everybody to have a copy of everything? Should other key players receive a copy of the memory or important parts of it? Determine who will be responsible for the typing and distribution of the memory and action register. Clarify by what date this will be done.

Figure 4.1

ACTION REGISTER

GROUP:

DATE:

WHO	WHAT	BY WHEN

The conclusion of the meeting is a great opportunity to thank participants for their involvement and sharing their views and information. When you acknowledge the group's productive behavior, you reinforce it and can expect to see more of it in the future.

Before adjourning, solicit feedback on the effectiveness of the meeting. Your perceptions of how the meeting went (participation, reaching decisions, keeping focused) may not be shared by the participants. It's important to tap into *their* perceptions of how the meeting went. One way to do this to use a verbal plus/delta technique. Some meeting leaders might feel uncomfortable receiving feedback verbally. On the positive side, verbal feedback is a good opportunity for building ideas, if facilitated well. Ask the team what went well during the meeting and what could be

done differently. Either you or a recorder writes the feedback on a flipchart or board (see Figure 4.2 for a sample flipchart). The delta stands for change. This doesn't mean that this part of the meeting was wrong; rather, it was perceived as inappropriate for this particular meeting. One drawback of the verbal plus/delta method is that you may not get very specific feedback.

Figure 4.2

Sample Flipchart for Plus/Delta Technique

+	△

You may also ask for written comments. A feedback form such as the one shown in Figure 4.3 usually elicits more specific feedback. The tradeoff is that you may lose some valuable comments. Allow room for these comments on the written form.

* * *

Successful leaders realize that the effectiveness of the meetings they lead relies heavily on the preparation they do prior to the meeting. The focus on process, balanced with content issues, is critical. Successful meeting leaders block off time on their calendars to prepare for meetings.

Each meeting is unique. Meetings differ based on the content issues, the people involved, the timing of the meeting, the location, and so on. The principles of effective meeting management discussed in this book can serve as guidelines. They apply to many different types of meetings in many different situations—in schools, in the community, in industry, etc. Feel free to adapt the tools and techniques discussed in this book to meet your teams' unique needs.

Good Luck!

Figure 4.3

Meeting Feedback

1=Strongly Disagree 4=Neutral 7=Strongly Agree

1. The purpose and desired outcome(s) were clearly stated.
   1 2 3 4 5 6 7
2. The leader was adequately prepared.
   1 2 3 4 5 6 7
3. Participants were adequately prepared.
   1 2 3 4 5 6 7
4. I received enough advance notice on this meeting.
   1 2 3 4 5 6 7
5. The agenda was reviewed at the beginning of the meeting.
   1 2 3 4 5 6 7
6. The ground rules were reviewed at the beginning of the meeting.
   1 2 3 4 5 6 7
7. The times set for the agenda items were realistic.
   1 2 3 4 5 6 7
8. The discussion remained focused.
   1 2 3 4 5 6 7
9. A productive pace was maintained.
   1 2 3 4 5 6 7
10. Participation was balanced.
    1 2 3 4 5 6 7
11. Differing viewpoints were encouraged.
    1 2 3 4 5 6 7
12. Disruptive behavior was dealt with effectively.
    1 2 3 4 5 6 7
13. Action plans were developed.
    1 2 3 4 5 6 7
14. Conclusions were reached.
    1 2 3 4 5 6 7
15. The type of meeting was appropriate for the task and situation.
    1 2 3 4 5 6 7

Please write additional comments on the back.

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Appendix

Meeting Planning Reference Guide

Purpose: Why are you meeting? (State as a verb; you may have several purposes.)

Desired Outcome: What do you want to walk away with? What is the "product" of the meeting? (State as a noun; it's okay to list several desired outcomes.)

Is a meeting really necessary? Can the desired outcome be achieved through different means (phone call, conference call, written communication, speaking with individuals)?

Who should attend? Have you considered people who can help implement the decision? Block the decision? Actually do the work? Customers (both internal and external)? Have authority with resources? Are the decision-makers? Are affected by the decision?

What are the beginning and ending times of the meeting?

What is the date of the meeting? Location?

What are your audio-visual needs? Does the location have this equipment?

What items will be on the agenda?

What are the desired outcomes for each agenda item? The person responsible? Time allotted?

What preparation is required of the participants? What materials will be needed?

Prior to the meeting:

1. Reserve the meeting room.
2. Send the agenda to the meeting participants one week prior to the meeting.

3. Solicit pre-meeting feedback on the clarity of the meeting purpose, desired outcome, and agenda.
4. Prepare flipcharts of the purpose, desired outcome, agenda, ground rules (titled paper to help build the ground rules with the team), action register (formatted and ready to use during the meeting), and a titled issue bin.

Opening the meeting:

1. Review and reach agreement on the purpose and desired outcome.
2. Review and reach agreement on the agenda.
3. Review and reach agreement on the ground rules, including the roles of recorder and timekeeper.

Concluding the meeting:

1. Review and clarify the action register.
2. Review and clarify the issue bin.
3. Decide on what portion of the group memory will be distributed, who should receive it, by what date. Reach agreement on who will distribute the memory and action plan.
4. Solicit feedback on the effectiveness of the meeting.

How to Get the Most Out of Meetings

Anyone who has ever spent a wasted hour in an unnecessary meeting that accomplished nothing will appreciate the excellent practical advice in this book. Cindy Lakin Morley addresses those educators who must regularly lead meetings of school improvement teams, parent-teacher organizations, curriculum committees, school faculties, and numerous other groups engaged in collective decision making. In this concise guidebook, you will discover the difference between content issues and process activities and find out how to:

- determine if a meeting is really necessary
- create a clear, well-defined agenda
- decide what and who is needed to make a meeting successful
- handle disruptive behavior during a meeting
- open and conclude meetings effectively
- ensure that follow-up actions are carried out.

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